

[Note: This is a transcript created from a live relay service provided on April 19, 2018, for the **Hands-on Section 508 Workshop--Basic PDF Editing**, presented by **Jennifer Fagan-Fry** at **NOAA Central Library**. There may be errors in the transcription. If you have difficulty accessing information for this program, particularly if using assistive technology including screen readers, eye tracking devices, or voice recognition software, please email us at [library.reference@noaa.gov](mailto:library.reference@noaa.gov) with the following information: URL (web address) of the material you tried to access, the problem you experienced and your contact information. We'll get back to you as soon as we can, and attempt to provide the information you're seeking].

---

## INTRODUCTION

All right, everyone. It is 2:00. Good afternoon. My name is Jennifer Fagan-Fry. I am the NOAA Institutional Repository Manager. I am also a metadata and cataloging librarian here. We are going to take about 30 minutes and go over some basic PDF editing for Section 508 compliance. We only have about 30 minutes. I am not going to be able to take any questions, unfortunately. I am sure people will have questions. Judith Salter another librarian here is monitoring our chat and the question panel in webinar. If you have a question, please put it in the question panel. Those will be emailed to me after the webinar is over. That way I can see your question, respond directly, and get you the answers you are looking for. We only have 30 minutes, so I will not be taking any questions live. Please put them in the questions panel. They will get emailed to me and I will get you a response.

---

## SECTION 508 COMPLIANCE GUIDE: LIBGUIDE SECTION 508

This webinar will be recorded. We will be posted on the library's website. I will also post it here on the [Section 508 compliance guide](#) that I have created. I am sure a number of you have been to it. I have information about creating accessible documents, website accessibility, tools. I have a section that let -- links to all of the Section 508 brownbag seminars. Once we are done here today and we have everything recorded and a transcript of it, we will posted on this page, as well, and on the [library's brown bag page](#). We will get started. I see people are still coming in. Hello to all of those people. I am going to get started because we have a lot to go over.

---

## COMMON PROBLEMS AND ACCESSIBILITY ISSUES

I am going to walk you through some really common things -- problems in Section 508 accessibility -- accessibility issues that we have noticed people having when they are submitting documents to the library. I have the NOAA document pulled up that is not compliant. We are going to make it compliant today. I have the document open in Adobe Acrobat Pro 2017. What I need to do is open up the accessibility toolbar. To start, on the right-hand side you will have the menu panel. If you click on, more tools, it will bring up a whole list of a number of toolbars, and things that you can add to your main menu bar. If you go under protect and standardize, you will see this option for accessibility. If you click on add, it drops it into your main toolbar. I am going to open up accessibility. It will take it back to my documents. It will change my right-hand menu

here. You will see reading options, the full check for the accessibility report, the copy of the accessibility report and a few other things we are going to go through. I am going to run this full check, to start. If you click on -- full check -- you will get a dialog box. This box shows all the options you can choose when you are running an accessibility check. I tend to run everything. So it has checking options 32 of 32. I like to know everything that is wrong with my document. I want to stress that the library only checks to five main things when it comes to accessibility. Document properties, so the document is tabbed and chronological reading order. We look for text for figures and charts. And we checked bookmarks for documents. In terms of bookmarks, if the document is under 20 pages, it does not require bookmarks.

---

## START WITH DOCUMENT ISSUES AND DO A MANUAL CHECK

From here, I am going to start my check by clicking the start checking button. It runs through every element on all the pages. Sometimes it takes a moment. If it is a larger document you will have to be patient. Once it has run and run the check, it will bring up this new item on the panel. If it is like if there's a problem with any of the items, it will be bolded. We are going to start at the top. We are going to start with document issues. When you open it up, any checkmarks show that that item has passed, so you don't need to worry about it... If there is a question mark it means it requires a manual check... A manual check means you will have to go through and look at the reading order. Look through each of those elements manually.

Color contrast is a similar thing. You will always have these two things is a needs manual check. The system cannot check for this. When you're looking at color contrast, you want to make sure all the text is readable. You want to avoid the red green contrast for people who are colorblind. Make sure your background does not overpower your text itself. We are going to start with this X here for title. The title has failed. This is part of your document properties on the item. We look for two things on the document properties. That the document has a title in the title field and that the language has been identified in the item. Here, you will see the primary language has path. We don't need to worry about that. We do need to I -- edit the title to make sure the -- title shows up in the property. When you are in Adobe, all you have to do is hover over the item and right click on the item. In this instance, for title, I simply click fix. It will fix the item for you... There is also an option to skip the rule, which I do not recommend. If you click on explain, it will open up the Adobe documentation and take you to that particular section within the documentation. You were to click on this; it would take us to the section on title and document properties. So, explain why you need to do that and how to do so.

---

## OPTION TO FIX: RIGHT CLICK

Since there is an option here to fix, I am going to click on fix. Run through all the pages and fixes it. Once it does, you will see a little checkmark shows up. If you right click on the document itself, and you go down to document properties, you will see under descriptions, the title has been added.

---

## ADDRESSING FAILS: TAG CONTENT/TAGGED ANNOTATION/TAG ORDER

Now that we have addressed all the issues in document, I am going to come down here to page content. You will see that it says four issues. We have failed for tag content, tagged annotations and tab order. You also see the question mark here for navigation links. Again, the navigation links -- these are internal links. What it is telling you that you need to do is make sure that your table of context, if it is bookmark that's right bookmark, that those go to the correct places. If you have hyperlinks in the document, that those are working correctly and go to the correct page. You have to do this manually.

---

### FIX TAG CONTENT FOR ALL ITEMS

I am going to start here at the top with tagged content. This is something that will have to be fixed for all items. It is something that we check for when we are running our checks for the NOAA institutional repository. When I click the drop time -- dropped on, it shows me there are six elements. When you click on the element, it will be highlighted in the document. So, the title of this page is not tagged. What it means by tagged content; these are elements and content on the page that have not been assigned a tag. It has not been assigned a heading, or as a figure or table, whatever it may be. It appears, when you click through all of these, none of the content on this page has been tagged appropriately. We are going to fix that. I will start with this first one. When you are fixing tagged content, you have to make all these changes in the reading order section. I'm going to come back over to my accessibility main menu bar over here and click on reading order. This is going to bring up a new reading order dialog box. Let me move it here so everyone can see what I am doing.

---

### FIXING READING ORDER IN THE DIALOG BOX

In the reading order dialog box, you have a couple of options. I'm going to jump down here to the bottom where it shows -- show page content groups. This is going to show you -- you have two options. You can either look at the order of the autumn -- item or the structure type. Right now I have it on structure types. Since none of these elements are tagged, nothing is showing up. I am going to tag these items. Up at the very top there is an option for draw a rectangle. There's a little button here. It gives you the option to begin drawing your rectangles. What I am going to do is draw a rectangle around my title. Notice all those buttons that were grayed out are now available. I am going to select the tag for this item. For this content, because it is the title, I want to make it some form of a heading. I am going to select heading 1. Now you can see the structure type appears appear.

---

### DRAWING CONTAINERS AROUND THE CONTENT

I am going to continue on with all the elements. I am going to click my button up here so I can create another content container. I am gone going to draw the container around the subtitle. Going to do the same thing, except that it is a subtitle I am going to use heading 2. I'm going to come down here to this content and do it all in one big group. I am going to list this as a paragraph, just because I need the screen reader or Adobe read to just read through this information. So I have it marked as a paragraph. This content up here, I'm going to do something similar. I am just going to draw a rectangle around it, and assign a tag. Depending on the document, you might need to do a heading 4, heading 5. It depends on what the document is. Finally, I am going to tag my figure here. Logos -- in the library, we tend to tag these as figure. This will come up as a figure with no alternative -- alternate text. We are going to have to tag this is a figure. Now I have tagged all of this content. Each item has its own tag. It is a recognized element.

---

## CHANGING READING ORDER FOR ELEMENTS

I am going to go back down here to where it says show page content groups. Now I want to look at the content order. This is the reading order for your element. As you can see, it starts with 5, 4, 1, 3, 2. That is not the order I would like it to be in. I'm going to close this panel. I am going to come over here all the way to the left. Down the side you will see a number of icons. Currently we are in this one. This is the accessibility checker report icon. I'm going to come down to the Z. This is your reading order. When you come to this, it will show each page and each content element. Each container. If you need to adjust reading order, you can simply click and drag things. I am going to put the image first. It is the first thing on the page. It is the first thing someone reads. I will move it to the top. Now my image is 1.

---

## CLICK AND DRAG CONTAINERS TO THE PROPER PLACE

Now I want this NOAA Research Council Silver Spring to be the second thing that is read. So I just drag it up to that position. Now, the title would be the third thing. That is already in the third position, so I don't need to move anything. But, what it has done is moved be prepared by info above the subtitle... Again, we are just going to click and then drag and drop it into the proper place. Now I have altered the reading order for this... This can be done on any page. It can be done at any point in time. You just have to be in -- reading order. Sometimes, when it comes to reading order, one of the biggest problems we have seen is that an image will have a caption. Sometimes it will flip the image and the caption reading order. If that happens, you can fix it. You do not have to fix it. We do not fail people based on that alone. But, if I had let this reading order as it was initially listed, we would have failed that work.

---

## TAGGED ANNOTATIONS

From there, now that we have all this content tag, and everything is in the appropriate reading order for this page, I am going to go back to our accessibility checker report. I am going to move on to the next element which is -- tagged annotations. Notice, this particular element is actually that DOI that we included in that paragraph. It is already part of the reading order. I am not going to do anything with this at this point in time. I am going to leave it. I know that DOI is included in the reading order. I know that Adobe reader is going to read through and catch that information for someone with a visual impairment. I'm going to move down to tab order.

---

## TAB ORDER

I'm going to click on tab order. There is a problem with this first page. Tab order refers to the order in which elements are moved through when you use tab on the keyboard. For people who are unable to use mice, people who rely on keyboard navigation. You would write click on this. You have the option for fix. Simply click on fix and you will get a dialogue box that says tab order set to max -- match structure. I'm going to click okay. That element should be fixed. At this point in time, since I have gone through and tagged elements, I have altered some reading order, I'm going to rerun my accessibility check just to make sure I have not messed anything up.

---

## FULL CHECK

I go back over to full check and start checking. And we will see what happens. You will see that some things have disappeared or have been marked as okay. The document issues have now gone down to 2. Tag content says past. They with tab order. As I mentioned, I am going to pass over this tagged annotations. It is part of the reading order in a different container. I am not going to read about -- worry about it. We can move on to the next element which is this alternative text.

---

## ALTERNATIVE TEXT

When you click on the arrow, it will show you all the alternate figures that require alternate text in this item. There are only one -- is only one. When you right-click on it, it gives you the up and -- option to fix, skip rule, or explain. For alternate text, I recommend clicking fix. It will bring up a dialog box where you can enter the alternative text for the image. If there is more than one image, it will have image 1 of 30. You put in your text -- NOAA logo -- , and that I will click save and close pick if there were more images that required alternate text, this would not be grayed out. You what have an arrow here. You would click on the arrow to move on to the next image. You can choose that until you are completed with all of them. Then you can click save and close. It runs through the whole document one more time. Now you can see we have a green checkmark.

---

## ADDRESSING TABLES

You will notice that there are table issues. I mentioned before, we do not focus on tables. Table issues are difficult and tricky. If your document has all other elements passing, but there is a problem with tables that [have particular] headers, a summary, we will not fail a document based on tables alone. I am actually going to leave those because we do not focus on tables. We are not concerned with those elements.

---

## HEADINGS

Also, headings. The problem with these headings is it is saying they are inappropriately nested. That means someone moved to best youth heading one and instead of moving to heading two, they moved to heading six. This is not something we checked. It is a level AAA requirement, in terms of Section 508. It is not a required element. We do not check it or fail people on it. If this comes up in your check, you can ignore it. The other thing we will check is bookmarks.

---

## BOOKMARKS

On the left-hand side of the screen you will see the little book mark icon. If you click on this, it will bring up all the items -- elements that have been tagged as bookmarks in this document. Bookmarks should be logical. They should follow the structure of the document. Generally, we recommend that people follow their table of contents. I am going to use girl down here for table of contents. You will notice that these bookmarks mirror what the table of context says. We will also do a quick check. We will click on them and make sure that the book marks go to the correct page.

---

## REVIEWING BOOKMARKS

As you click through you can see these are skipping to that section that they say they should skip to.

---

## REVISIT THE READING ORDER

The last thing that we will check in a document is the reading order. We will go back to this reading order section here. I am going to scroll back up to the top page. Excuse me. Within reading order, on each page like I showed you earlier, it shows each element. It gives each element a number and will show you what number those are in. We will check through each page and make sure that everything is in a logical reading order. So page 2, page 3, page 4, so on and so forth. And you can see that everything is going one, investment 1, 2, 3, 4. This one has an odd thing and it. Notice that 5 is kind of here in the middle of a sentence. What you can do is go over here, and you will see the containers. So 1 is going to have this bulleted list here. 2 appears to be blank. We don't need that. It is just an extra element. To get rid of items like that, sometimes

there is an extra space that has been added into a document. You will want to get rid of these. If you write click on it you can delete items selected structure. This will delete that element from your reading order. It moved everything down. So on and so forth.

---

## CHECK THE REST OF THE DOCUMENT FOR THE READING ORDER

Then we would continue on through the rest of the document, checking the reading order. Normally we would go through every page... I am only going to go through these few in terms of time. Once these changes have been made, if this document in this state would be submitted to the repository, we would deem it 508 compliant.

---

## HOW TO ADD BOOKMARKS

I'm going to go through one other document. I am not going to do the full thing. I am going to show you bookmarks. I'm going to show you how to do bookmarks in a document that does not already contain them. I'm going to go to accessibility's and do my full check. Start checking. Notice there are a bunch of issues. This one is also missing the title. This one has a manual check from navigation. Alternative text is missing for a couple of items. Those are going to be handled the same way we did on the other plan. When I come up to bookmarks on this one, you will notice there is nothing here. I want to show you how to add and bookmarks from a document that does not contain them at all.

---

## CREATING BOOKMARKS FROM STRUCTURE

I am going to start from the home page -- the title page of the document. You can come over to the bookmarks menu and click on new book mark. You have a -- an option for new bookmarks from structure. Or you have the option to click on this bookmark with the little +. I would like to distinguish between new bookmark and new bookmark from structure. You can always do it from structure. I am going to click on that to show you. However, you need to make sure your document has proper structure elements like heading, tables, figures, heading to Mac, heading -- heading to Mac, heading 3. You should never select all when you're doing bookmarks from structure. If you select all, it will tag as a bookmark, every single paragraph, annotation, space Mark, table and figure and caption... Not very meaningful and would hinder the ability of navigation. Please do not select all when you are tagging book marks from structure.

---

## HOW TO ADD NEW BOOKMARKS FROM SCRATCH

I am going to show you how to add a new bookmark from scratch. I am going to go up here and click -- new bookmark. I have my new bookmark. If you click on it, you can change the name of the book mark. I am just going to put title page. You can put the actual title itself, anything to

indicate this is the beginning of the document. I'm going to click off of it. That I'm going to write click on it and set the destination. I want to make sure that this bookmark links to the correct page. I am going to set destination. A dialog box opens. It says, are you sure you want to set the destination of the selected book to the current location? It is title page bookmark, this is the title page. That is where I wanted to go so I am going to click yes. Now that I have that one done, I'm going to add another bookmark now. It just drops the new one in there. I am going to do -- table of contents... I'm going to scroll to the table of contents. Again, I am going to write click on the bookmark, go to set destination. It is going to ask me -- do I want to set this destination to the current page? I am on the table of contents page and this is the table of contents bookmark. I am going to say yes. Now you can check that goes back to the title page. This takes me to the table of contents. I would continue on with that. I would do background, scope. Before I created the bookmark, move the document to each of the sections. It makes it easier when you are setting the destination...

---

## PRESENTER CONCLUDES PRESENTATION

With that, I have four-minute despair in my 30 minute time limit. I am going to stop -- four minutes to spare in my 30 minute time limit. I'm going to stop there. If you have questions that I did not go over, please put it in the question panel. I will review all of those. We will also use questions to set up another workshop. Hopefully next time we can set aside a little bit more time than 30 minutes. If you have any other questions, comments, or anything, you can always email me. My email is [jennifer.fagan-fry@noaa.gov](mailto:jennifer.fagan-fry@noaa.gov). I have also created a [How-to manual](#) that mirrors everything I just did. This will be available on the Section 508 guide. It is available [on the [Brown Bag website](#)].

---

## PRESENTER THANKS EVERYONE FOR COMING

I want to thank everyone for coming. I appreciate it. Please let me know if you have any more questions or concerns... I hope everyone has a good day. Thanks.

---

[ Event Concluded ]